USDA User Profile Guidance

Step-by Step Instructions for Creating/Modifying Coordinators & Approving Officials Information

USDA OPPM Charge Card Service Center

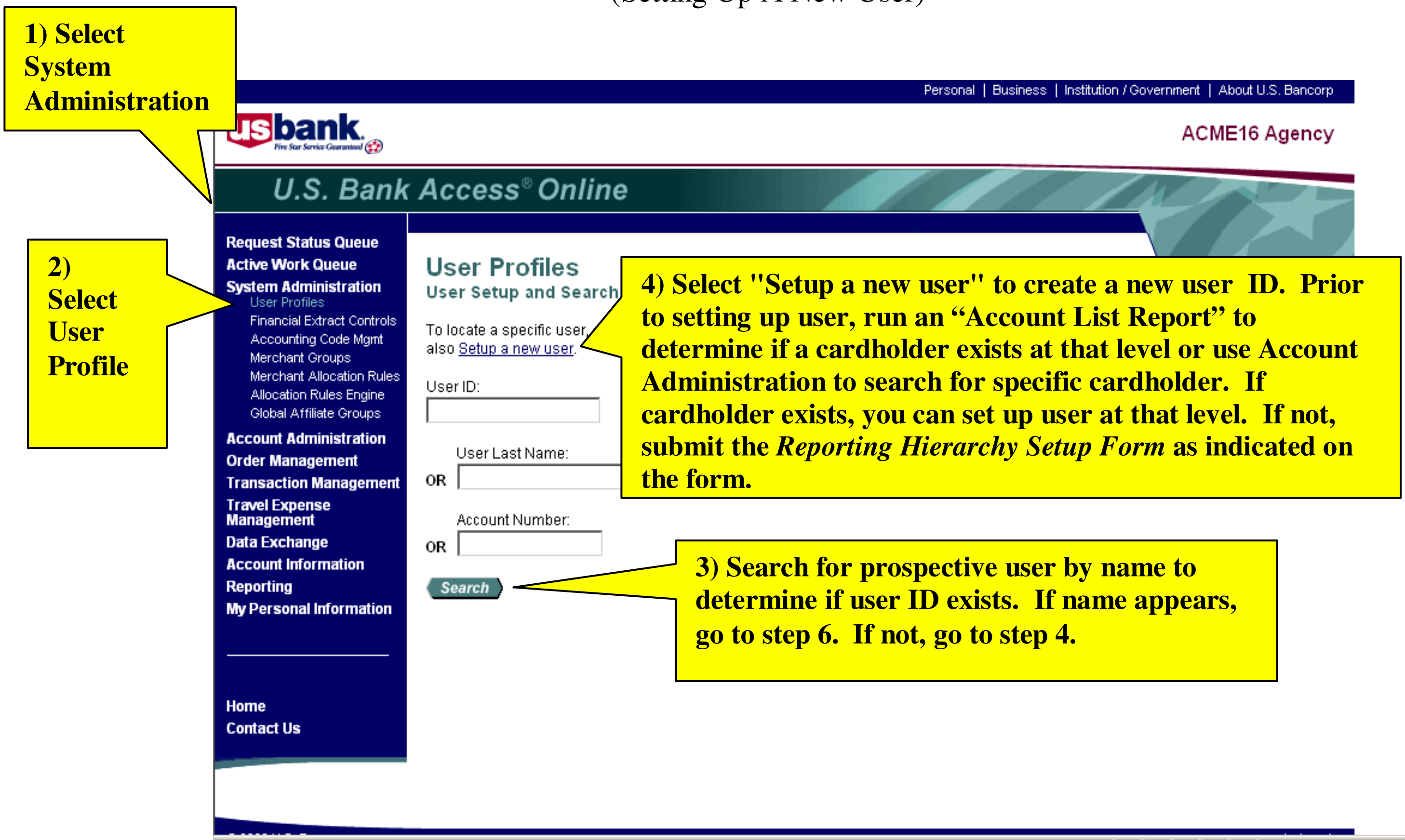
Originated March 2009

This guide was developed with the assistance of US Bank to provide Coordinators with step-by-step instructions to create/modify user ids for LAPCs and Approving Officials (AO)s. APCs have the capability to create/modify user ids for LAPCs. LAPCs have the capability to create/modify user ids for AOs.

This quick reference guide is to be used together with the User Profile User Guide found on https://wbt.access.usbank.com. Additional questions about this guidance should be directed to the USDA OPPM Charge Card Service Center at ccsc@da.usda.gov.

USDA User Profile Step-by-Step

(Setting Up A New User)

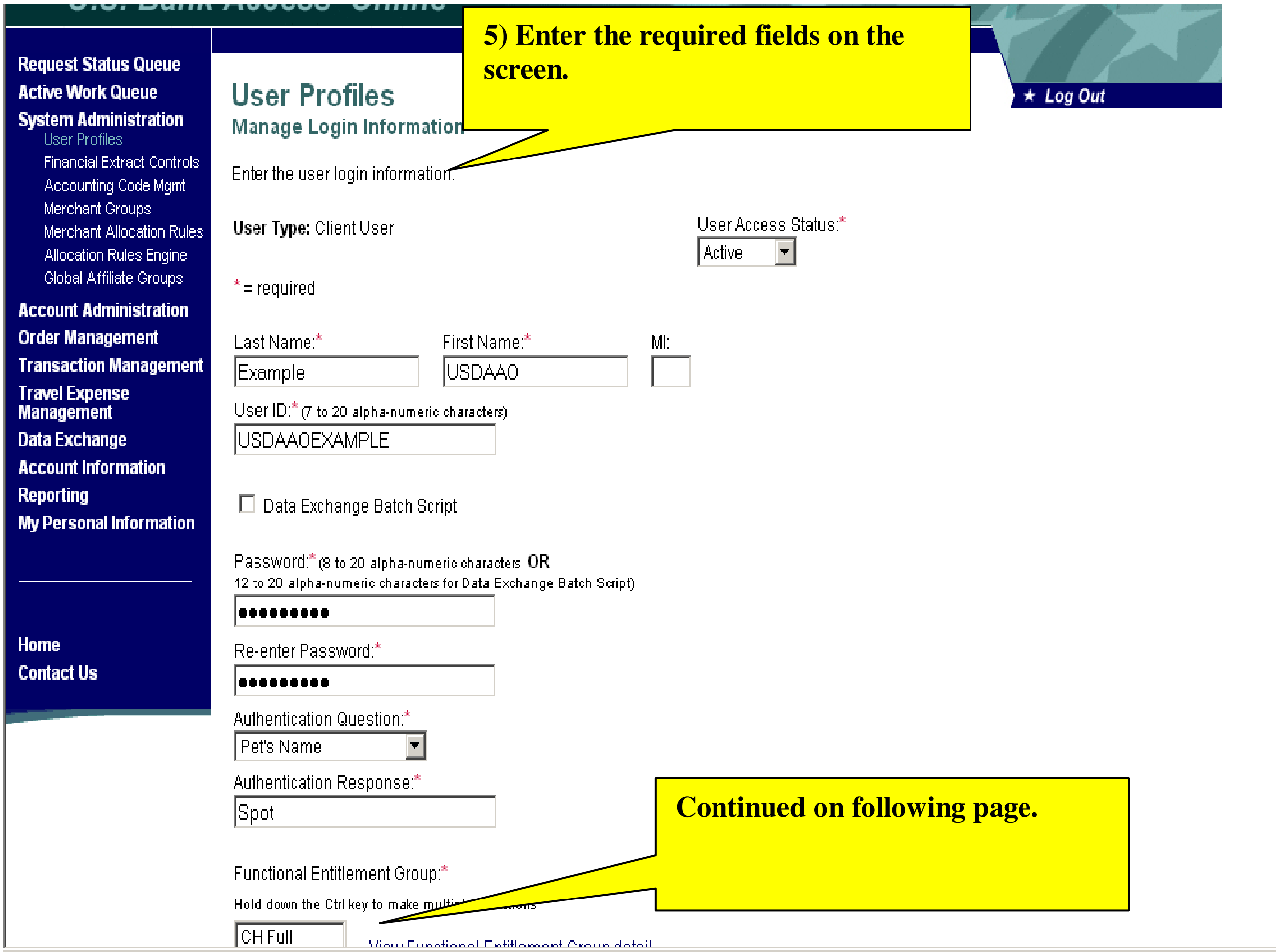


- **User Profile gives USDA APC/LAPC/LFPCs the ability to setup new user IDs for APCs/LAPCs/LFPCs/AOs that sit below them in their hierarchy real time in Access Online**

- **Simply log in to Access Online, select System Administration, select User Profile, and begin**

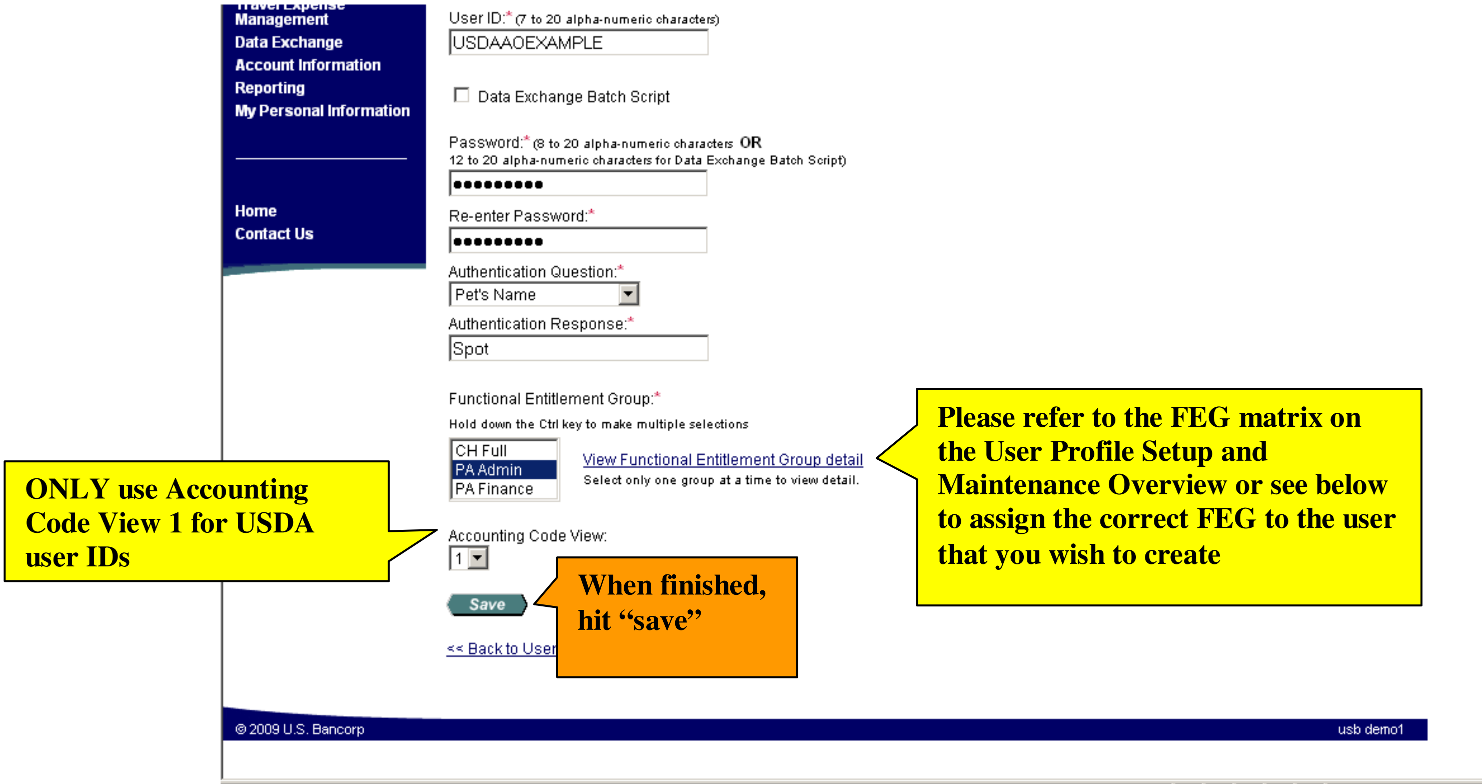
- **Prior to using the feature to "setup a new user", use the "Search" function to determine if the requested user has an existing user profile. Enter the user's last name; then click "Search". If the user's name appears in the list as an LAPC/APC (PAGC_APC-LAPC) or AO (PAGC-AO4), then click on the name and perform applicable edits.**

Setting Up A New User Cont'd



- **Fill out the required fields on the first screen to set up log-in information**
- **Required fields are indicated with a red asterisk (*)**

Setting Up A New User Cont'd



USDA FEGs to be utilized in User Profile	**User Type**	**Description**
PAGC_APC-LAPC	USDA specific APC FEG	Account Setup and Maintenance, Transaction Management and Allocation, Fleet reporting
PAGC_AO4	USDA specific AO FEG	No Account Setup and Maintenance, no allocation and limited reporting
PAGC_RPT	Reporting only FEG	Standard reporting
PAGC_AO2	View only APC FEG	View only: Account Administration, Transaction Management and Standard reporting

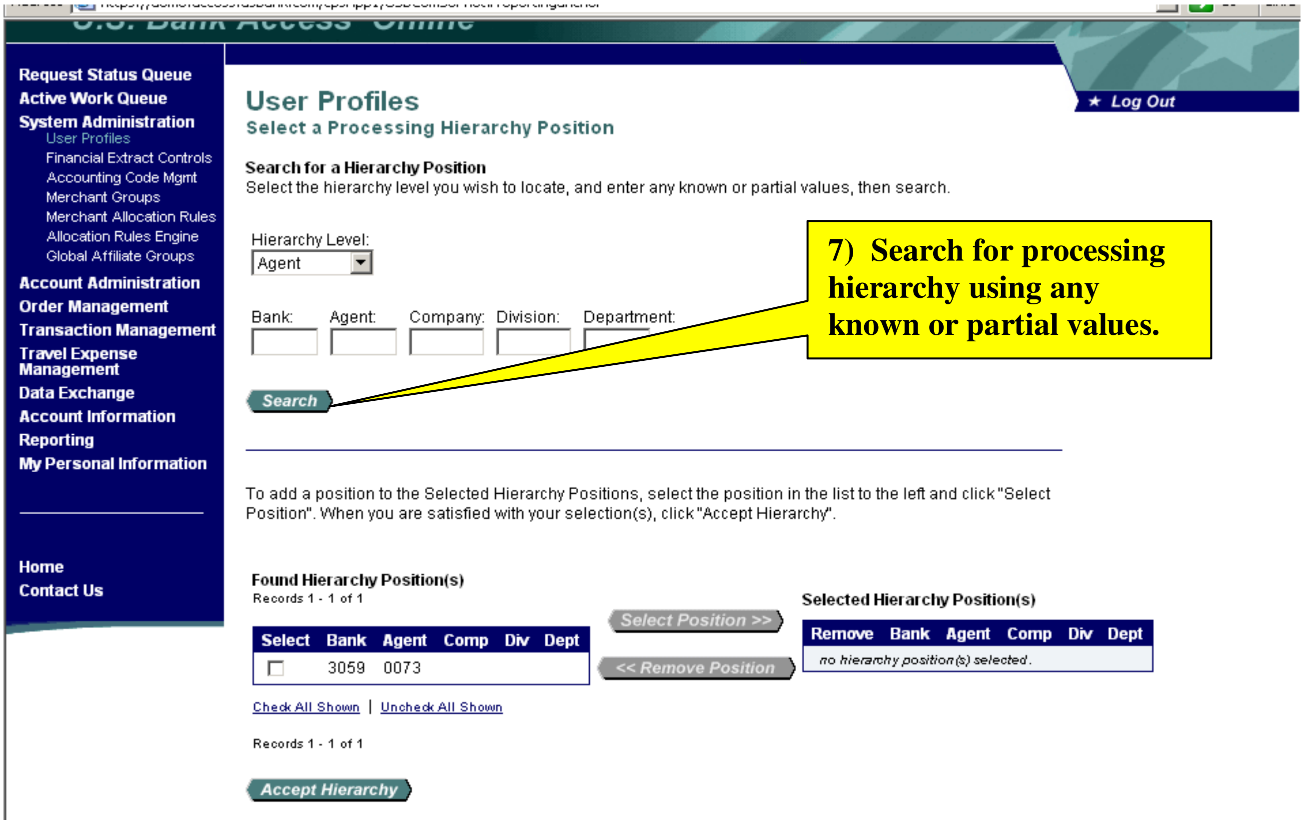
FEG matrix

- **For Purchase program use:**
  - **PAGC_APC-LAPC (LAPC/APC),**
  - **PAGC_AO4 (AO),**
  - **PAGC_RPT,**
  - **PAGC_AO2 (Financial POC)**

Setting Up A New User Cont'd

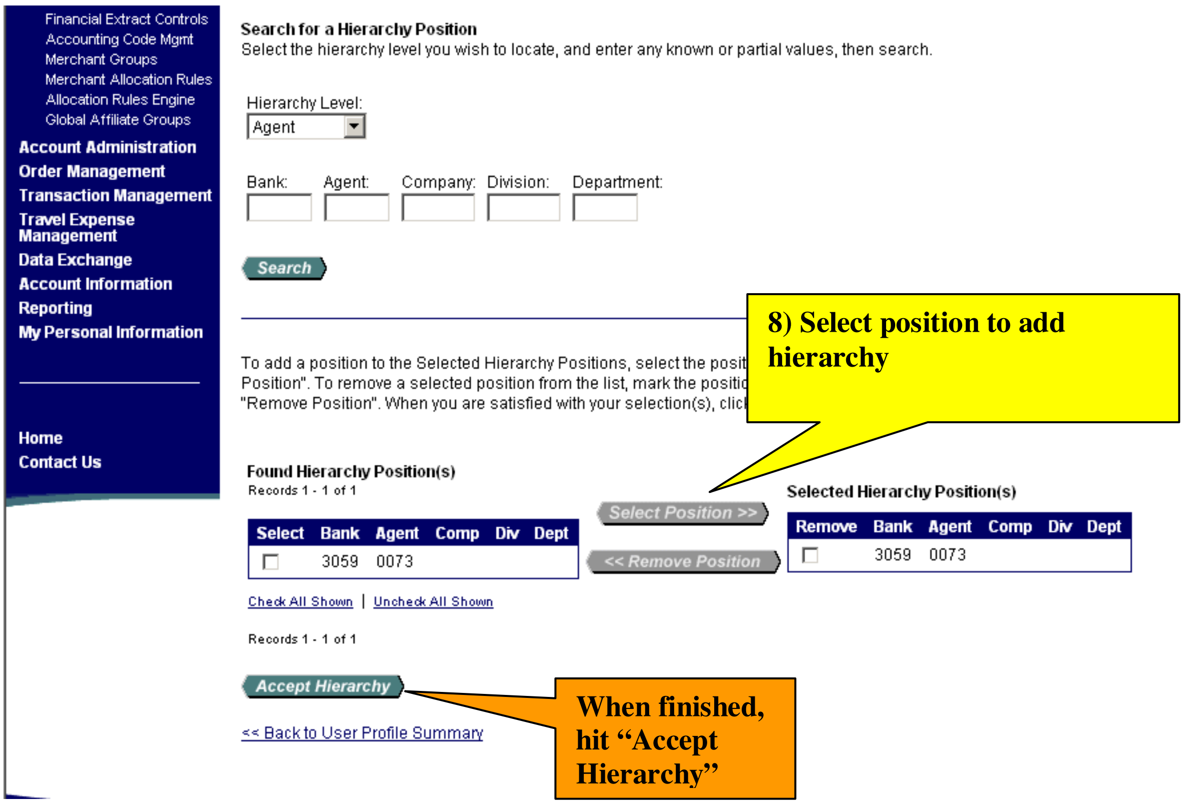
- **After clicking "Save", you are brought to this screen**
- **You should see the user ID log-in information that you set up at the top of the screen**
- **Next step, add processing hierarchy to the user ID**

Setting Up A New User Cont'd



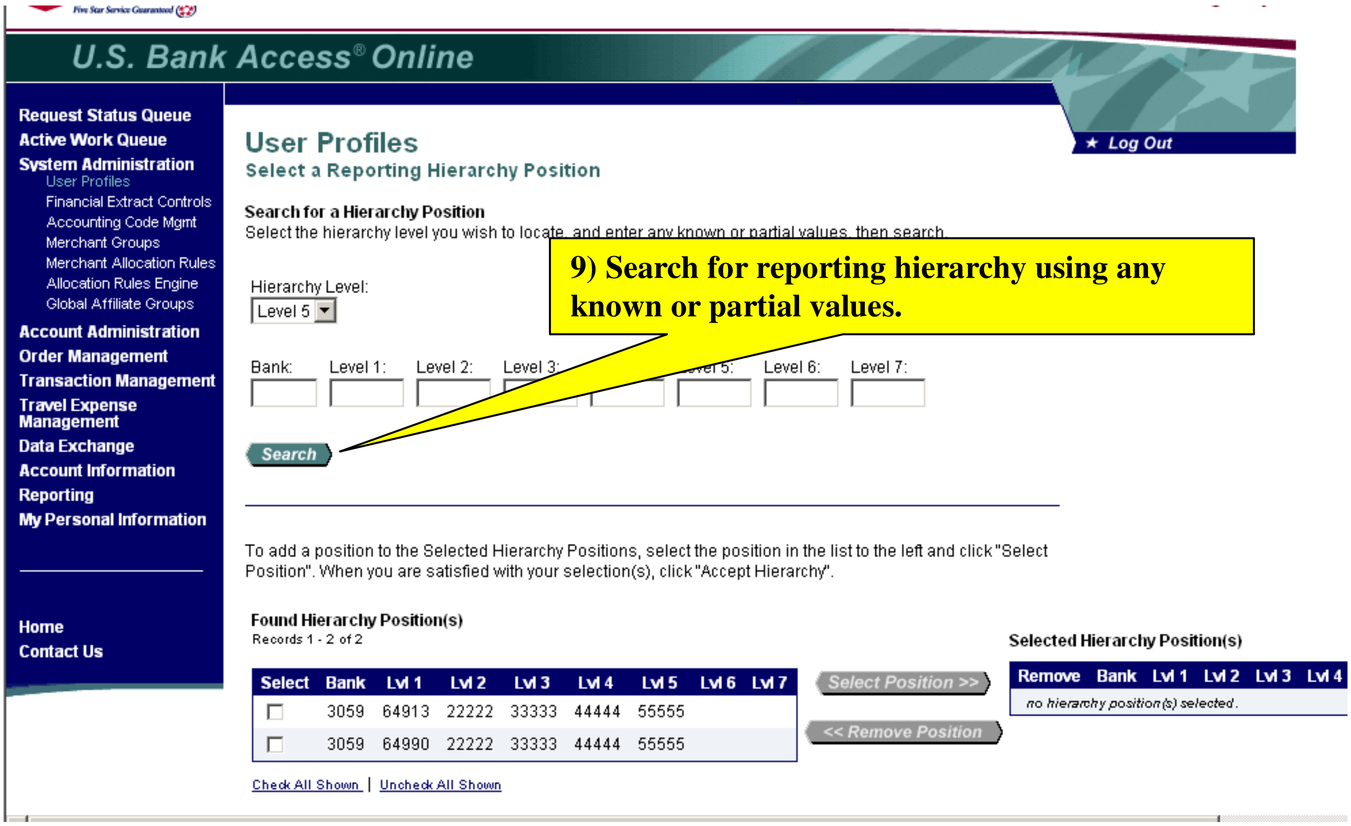
- **Search for the hierarchy that you wish to link to this user ID**
  - **APCs usually require one or multiple agent levels (level 4s)**
  - **LAPCs usually require one or multiple company levels (level 5s)**
  - **AOs usually require one or multiple division or department levels (level 6 or 7s)**

Setting Up A New User Cont'd



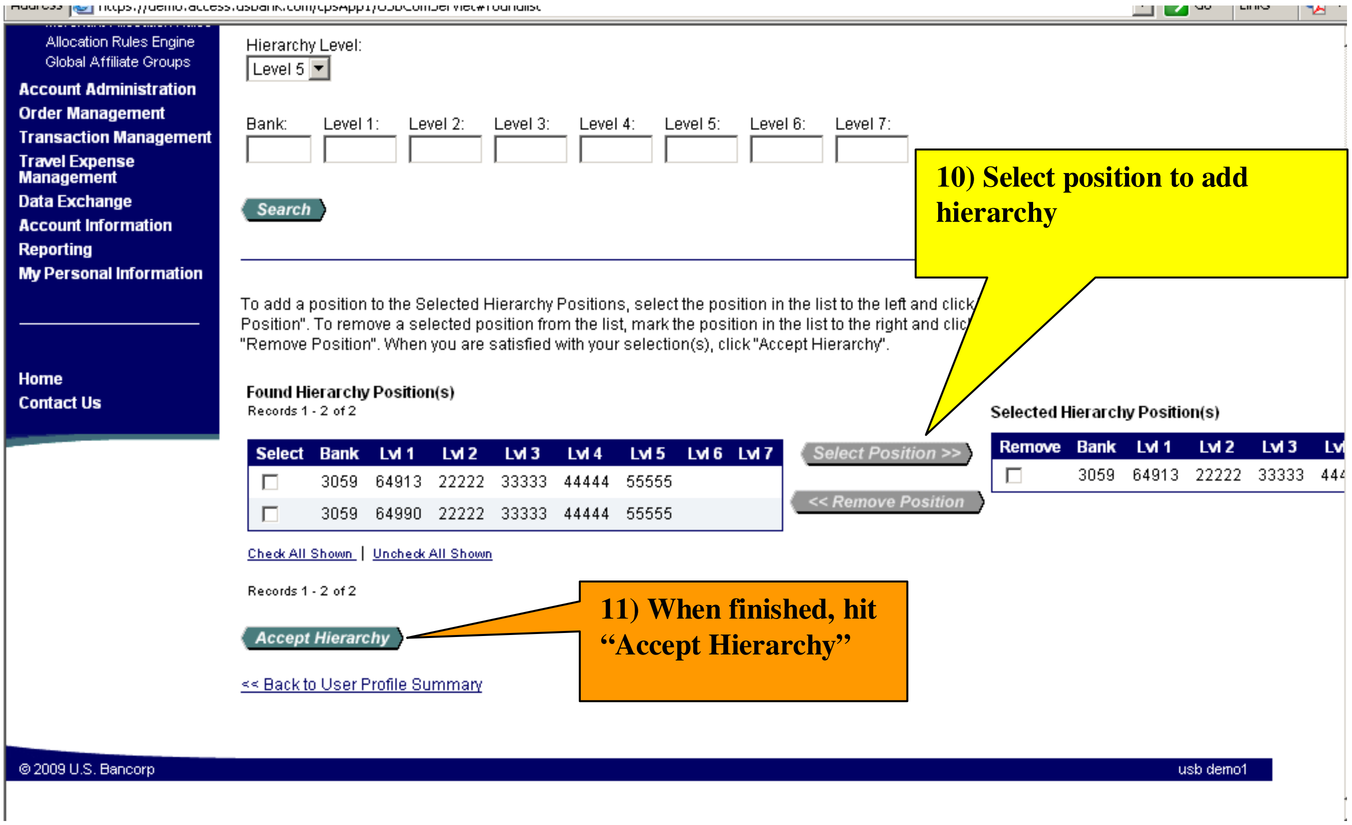
- **Place a check mark in the box to the left of the hierarchy you wish to link to the user**
- **Click on the button, "Select position"**
- **It should then appear on the right side of the screen under "Selected Hierarchy position"**
- **Click on the button, "Accept Hierarchy"**

Setting Up A New User Cont'd



- **Use the same process for reporting hierarchy**
- **Search for the levels that you wish to link to the user**

Setting Up A New User Cont'd

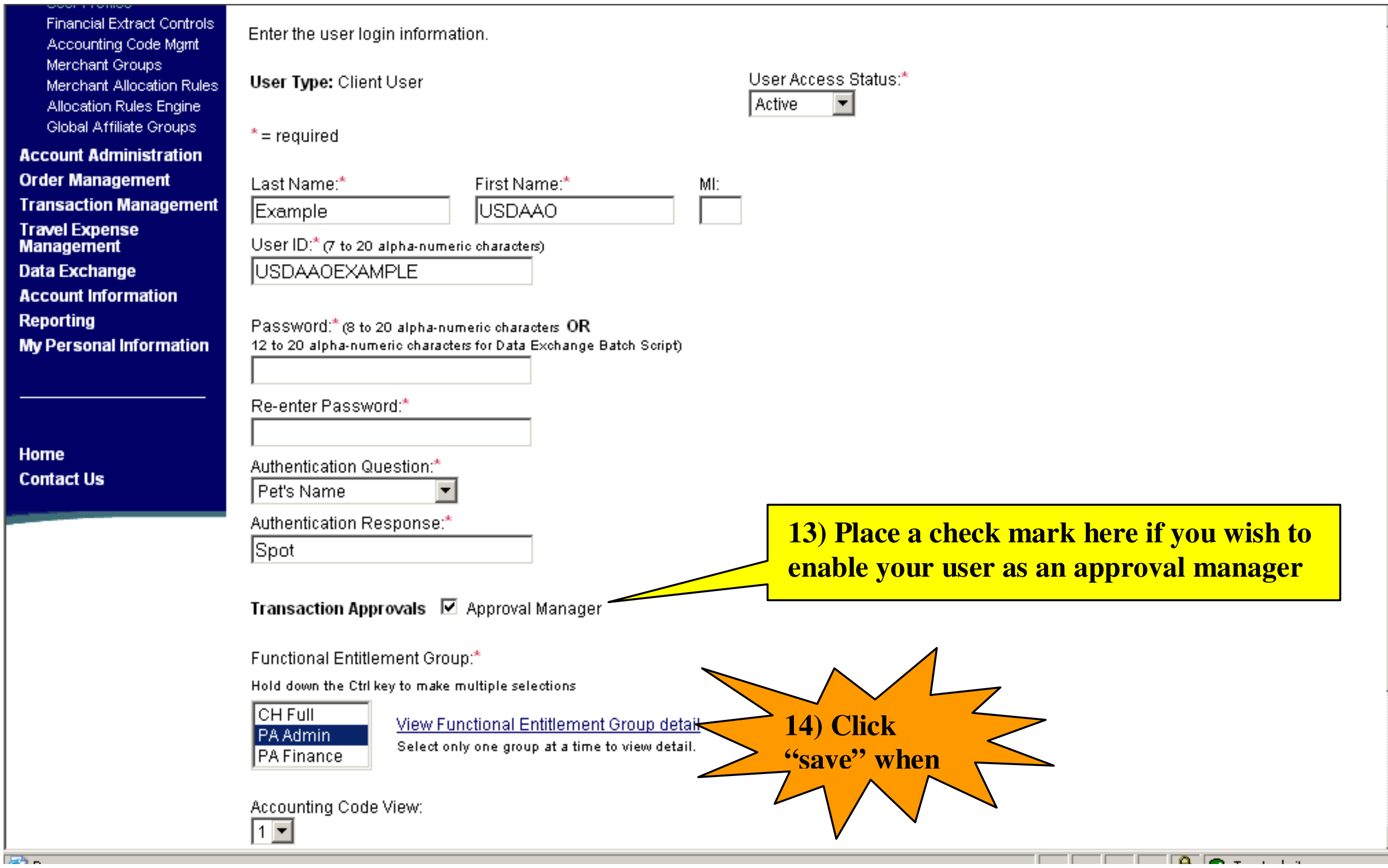


- **Select them with a check mark**
- **Accept the hierarchy**
- **You may also remove hierarchy from a user**
  - **Place a check mark in the hierarchy you wish to remove**
  - **Click on the button, "Remove position"**
  - **Accept Hierarchy**
- ***Note: Remember to add new hierarchy to a user before removing old hierarchy. If a user ID has all hierarchy removed you will lose the ability to maintain that user because he/she is no longer tied to your own hierarchy.***
- ***See page 15 to remove a user ID altogether***

Setting Up A New User Cont'd

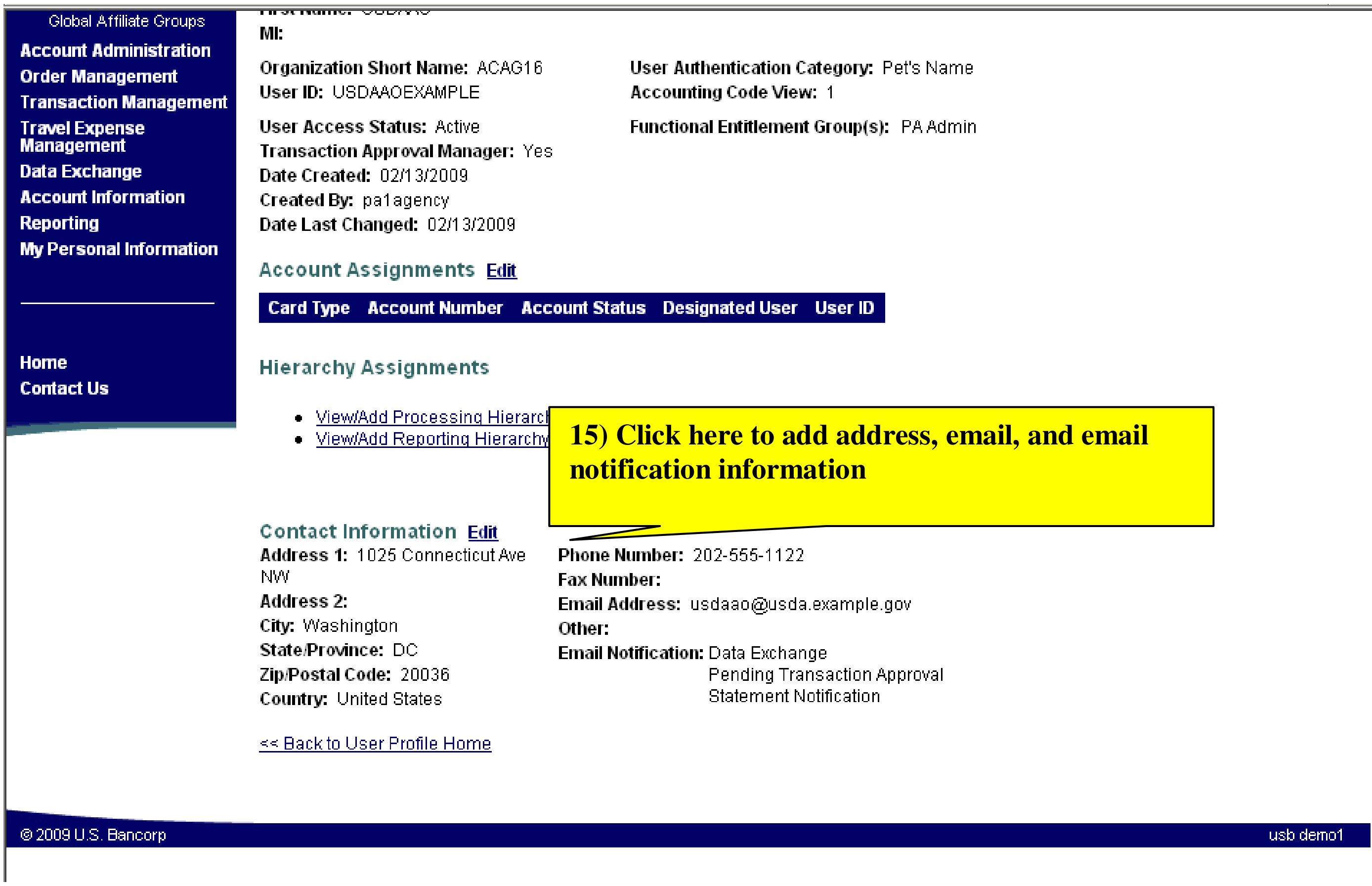
- **To enable a user as an approval manager (purchase APCs, LAPCs, AOs), click the login information edit link after linking hierarchy to the user ID**
- **By selecting the Approval Manager box, cardholders will be able to select and send approved transactions to this user for Final Approval**

Setting Up A New User Cont'd



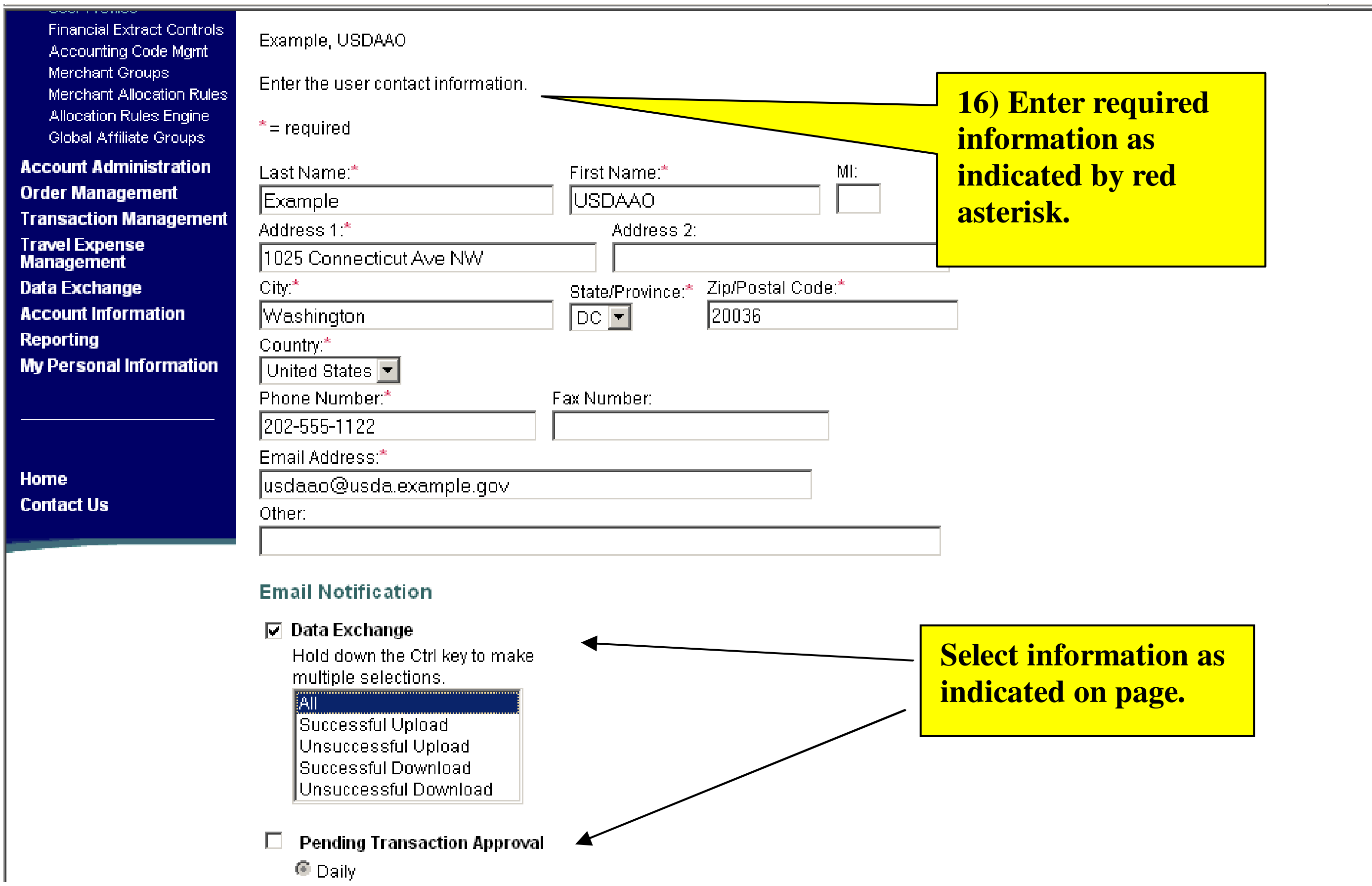
- **After placing the check mark in the Approval Manager box, click "save"**

Setting Up A New User Cont'd



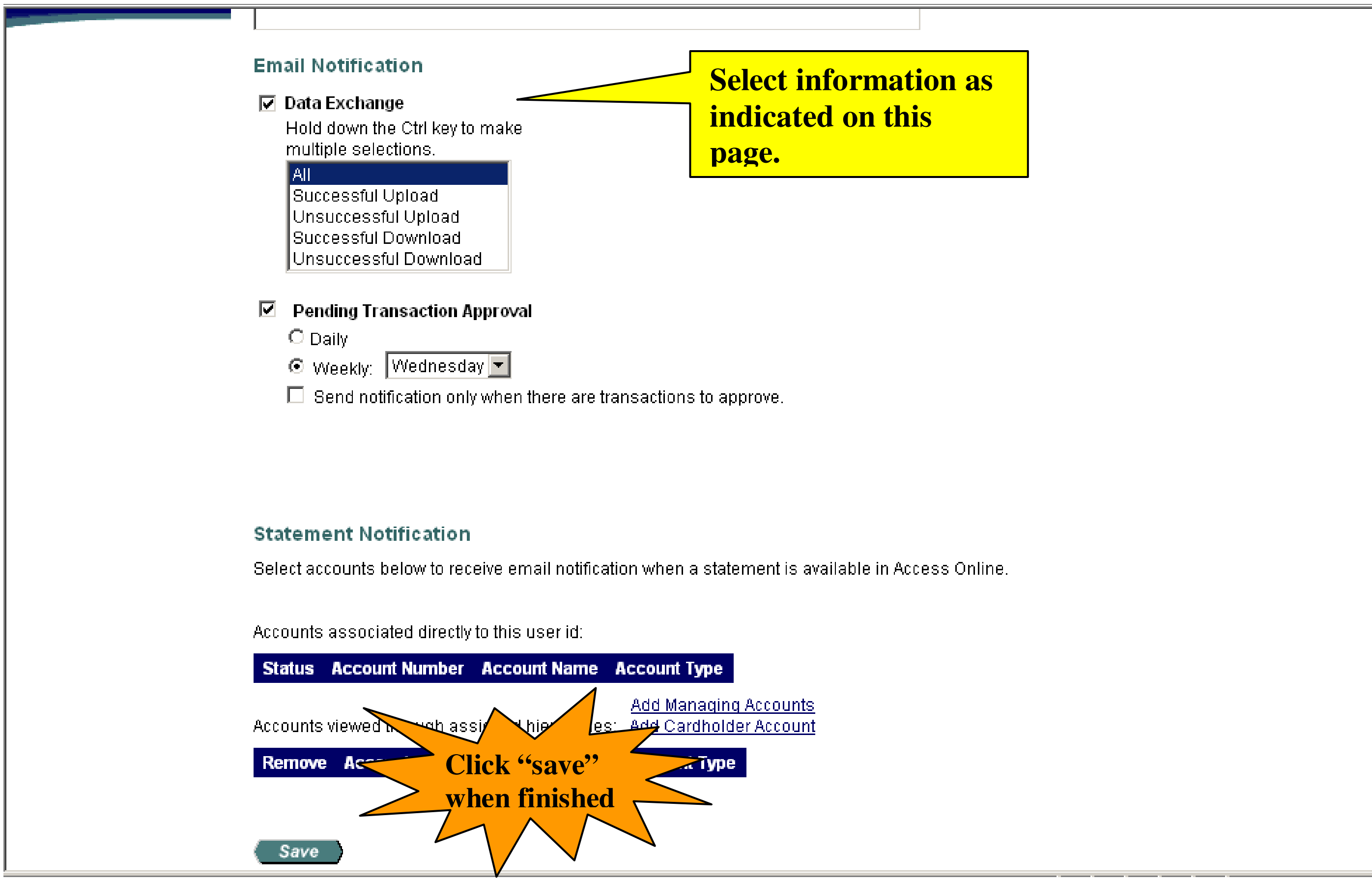
- **Select the Contact Information edit link to add the address, email, and email notification detail**

Setting Up A New User Cont'd



- **Fill in the required fields indicated with a red asterisk (*)**
- **Select Data Exchange to allow users to schedule reports and when to be notified by email if a report is populated for the user**

Setting Up A New User Cont'd

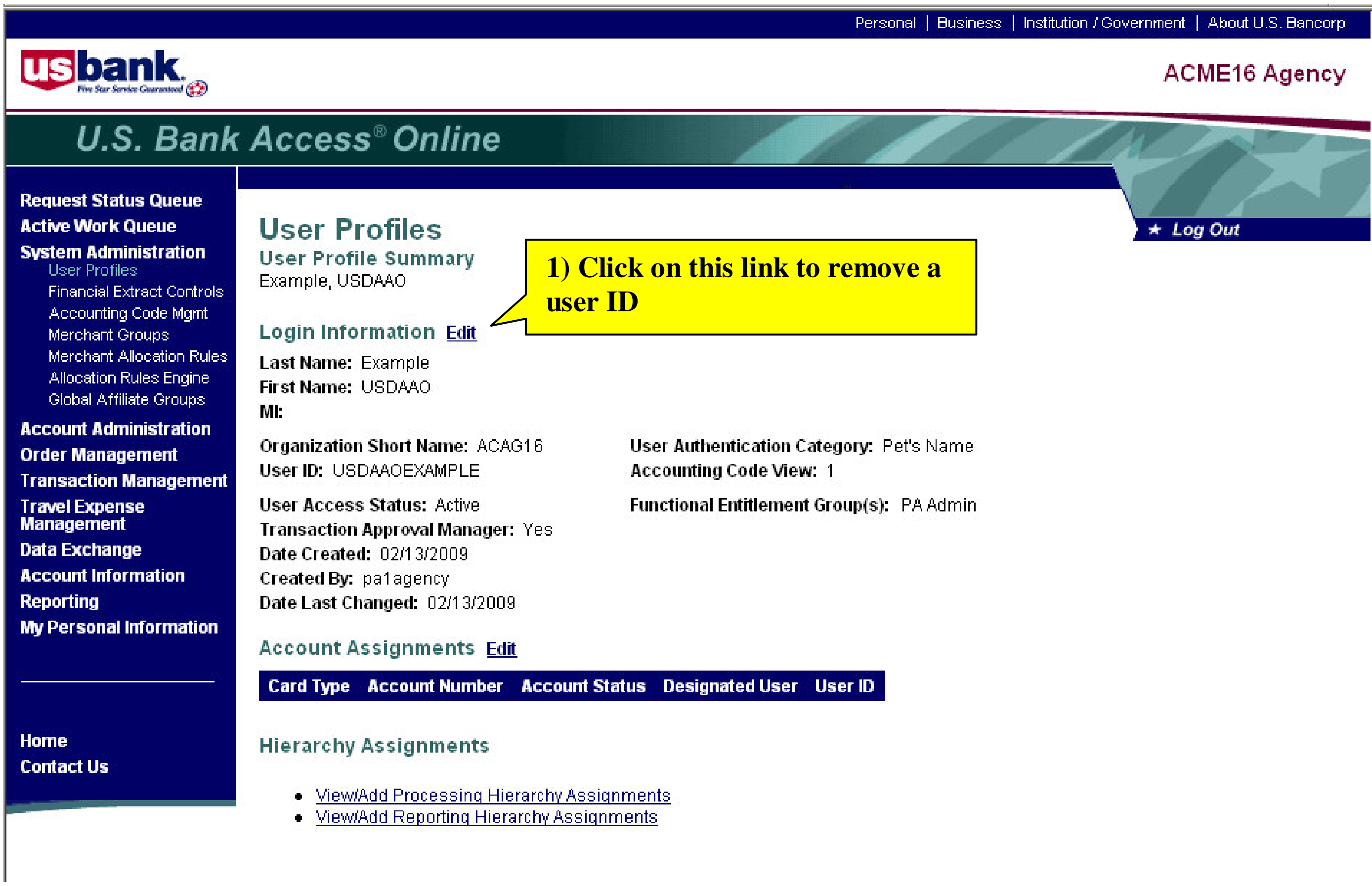


- **Select "Pending Transaction Approval" to enable email notification when an approved transaction awaits the user's final approval in their Approval Manager Queue**
- **Select when the user should be notified of approved transactions in their queue**
  - **The default selection for USDA is weekly on Wednesdays**
- **Ignore statement notification for all product lines**
- **Hit "save".**

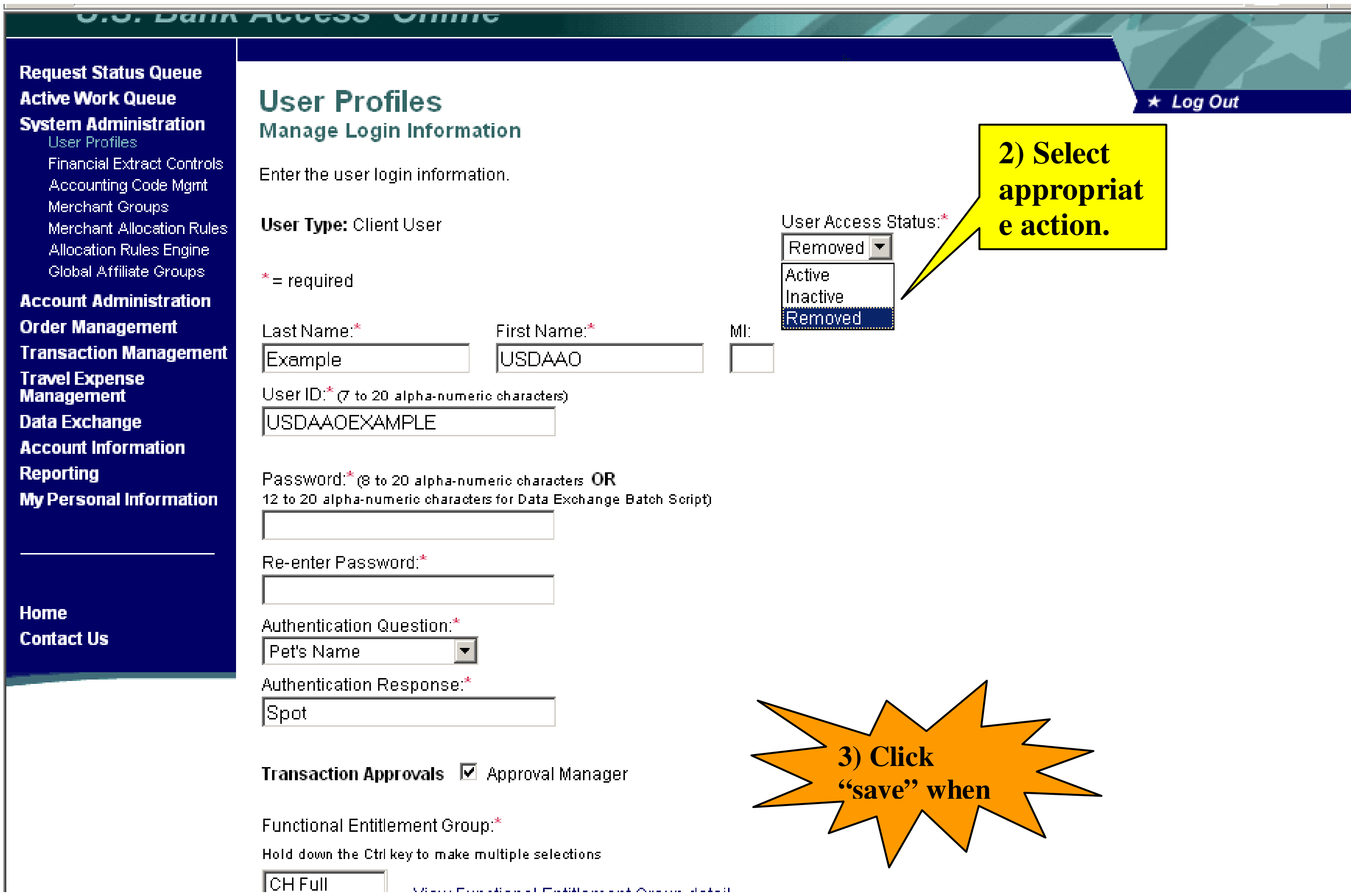
Setting Up A New User Cont'd

- **You will now see the User Profile Summary screen with your updates to the contact information**
- **Unless you need to maintain something, your request is complete and the user ID is created and ready to be used**
- ***Note: Approval Manager updates load overnight***

Removing a User ID



- **To remove a user ID, search for the user by user ID or name**
- **Click on the login information edit link**



- Select "Removed" from the drop-down box under User Access Status to remove a user
- You may also choose to make a user "inactive" if you do not wish to permanently remove the user ID
  - A user cannot log-in to Access Online if their status is "inactive"
- Click on "save" and your request is completed

For further questions contact customer service, the technical helpdesk, or your account coordinator